

# COMMUNICATE!



## A Reference Manual for Communications Coordinators

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## Why Use This Book?

All offices have a communications coordinator. The communications coordinator is the primary person who has contact with the public, by phone or in person. Their knowledge of the their positions allows them to be efficient and consistent in the information they give, thereby giving their office a professional image.

Many times someone else must fill the communications coordinator's shoes in their absence. Either the coordinator is at lunch, on vacation, or perhaps the calls are so numerous, the communications coordinator cannot handle them all. It is important that, whoever has contact with the public, via phone or in person, also present a professional image. To do this a person must be just as knowledgeable in the policies and processes of the office as the communications coordinator.

## TABLE OF CONTENTS

	PAGE NO.
I. Introduction .....	1
II. General Information/Policy .....	2
III. Initial Inquiry – 1 <sup>st</sup> Time Callers .....	3
A. Information on Legal Services .....	3
Questions/Answers	
B. Request for Legal Assistance .....	4
Questions/Answers	
IV. Further Inquiry	
A. Scheduling Appointments .....	7
Questions/Answers	
B. Case Approval .....	8
Questions/Answers	
C. Process of Case .....	8
Questions/Answers	
D. Request for Information on a Case by Third Party .....	9
Questions/Answers	
V. Screening Client Calls .....	11

## I. INTRODUCTION

Ring-g-g! Ring-g-g! “I need help!”

Usually, by the time a person calls Legal Services, they are in a situation where they feel out of control or in a situation they don’t understand.

Usually, they are frightened and don’t know where else to turn. This fear can come across as anger and frustration and it is important that we try to alleviate some of that frustration by providing confident and consistent answers.

This manual was created to provide easy reference to our general policies when dealing with the public and to provide answers to the most commonly asked questions.

\*Remember, how we handle them determines how they handle us.  
Communicate!

## II. GENERAL INFORMATION/POLICY

### General:

1. The phone should ring only a maximum of 3 times before you answer it.
2. A person should be on hold no longer than 30 seconds. If it must be longer, take a message and call them back.
3. Screen ALL calls.
4. Messages should be checked first thing in the morning and periodically during the day, then given to the appropriate staff person to respond.
5. More specific policies are listed in the individual sections to which they pertain. Read them ALL!
6. Legal Services has their own staff attorneys that handle the majority of cases that are accepted. Private attorneys also volunteer their time and efforts to help represent people who qualify for Legal Services.

### III. INITIAL INQUIRY

#### A. Information on Legal Services

1. Legal Services provides assistance to low-income clients, domestic violence victims, and the elderly in civil matters. Phone advice is available for qualified applicants in eight (8) counties: Leon, Jefferson, Wakulla, Franklin, Gadsden, Liberty, Calhoun, and Jackson. If it is clear that the person is not seeking help with a legal problem, but needs services from a social service agency, we should provide addresses and phone numbers of social service agencies that may be able to help them.
2. Legal Services of North Florida, Inc., consists of four offices located in Ft. Walton Beach, Panama City, Quincy, and Tallahassee, Tallahassee being the corporate office.
3. Applicants should always be informed that staff will assist them if they are unable to fill out the application.
4. Applicants should always be asked if they have been served with legal papers or have an emergency situation. If so, they should be advised to come to the office immediately and their application should be provided to the senior attorney for immediate review.

#### Q & A:

Q. “What is Legal Services?”

A. “We are a non-profit organization that provides legal assistance to low-income persons, domestic violence victims, and the elderly, in certain types of civil matters.”

Q. “How do I apply for legal services?”

A. “You can come to the office to pick up or fill out an application or I can mail you an application. You can return it in person or by fax or regular mail. Soon you will be able to apply online.”

Q. “What happens after I apply for services?”

A. “When you have completed the application and returned it to us, our attorneys will review it the following Monday (in Panama City) or Wednesday (in Tallahassee, Quincy, and Ft. Walton Beach) and we will send you notification of their decision immediately thereafter.”

Q. “Why do I have a fill out an application?”

A. “We are a federally funded program with certain guidelines we must follow. The application is necessary to evaluate whether you are eligible for our program and we must have a completed application for any work we do.”

Q. “How much will it cost?”

A. “Staff attorneys and paralegals are available to assist eligible clients with no fee for representation.

Q. “I only want advice. Is there an easier way to apply?”

For clients in Leon, Jefferson, Wakulla, Franklin, Gadsden, Liberty, Calhoun, and Jackson Counties:

A. “I will transfer you to someone who can screen you over the phone and forward your call to an attorney or set a time for you to speak with an attorney.”

For clients in Okaloosa, Walton County, Gulf, Washington, and Holmes Counties:

A. “You will need to fill out an application and indicate the nature of your legal problem. You will either receive a letter containing advice or a follow-up phone call from a member of our legal staff.”

For clients in Bay County

A. “You will need to fill out an application and indicate the nature of your legal problem. You will either receive a letter containing advice or a follow-up phone call from a member of our legal staff or a referral to First Saturday Legal Clinic where you can meet with an attorney.”

B. Request for Legal Assistance:

1. A client must qualify for our services before we can represent them. Some of the factors considered for qualification are income, type of case, if the case has any merit, if manpower is available to work on the case, and others.
2. No one can tell a person immediately over the phone if they will qualify or not. That decision is left up to the case acceptance committee. They must wait until their paperwork is reviewed by that committee.
3. Legal Services does not handle cases involving criminal matters or fee generating cases, i.e., traffic violation, assault or battery, personal injury, malpractice, etc.

Q & A:

Q. “What should I do if I need a lawyer or I need legal assistance or I need to talk to an attorney?”

A. “You need to fill out an application for our services. We can mail the application to you. What type of problem do you have?”

If it is criminal or fee generating:

“We do not handle criminal/fee generating cases. I can give you the Florida Bar Referral Service number [(850) 561-5600] and you can request the names of attorneys in this area that handle that type of case.”

If it is a type of case we handle:

Take person’s name, mailing address, and type of case. If it is a bankruptcy, divorce, etc., send the standard intake with the appropriate intake questionnaires.

Q. “This is an emergency, can I talk with someone right away?”

A. “Have you received a summons? What day did you receive it? What is the attorney’s name on the summons?”

B. “Are you in immediate danger?”

C. “Are you being removed from your residence?”

If yes to any of the above, find out what deadlines need to be met and (1) tell the caller he/she needs to come in and fill out an application or (2) see if a member of the legal staff can speak with the caller or (3) advise caller that you will have an attorney give him/her a call as soon as possible.

Q. “I have a question, can you answer it for me?”

A. “What is your question?”

If it does not involve giving legal advice of any kind and you can give them an answer or can refer them to another agency, do so.

If it does involve giving legal advice: “I’m sorry. I am not qualified to give legal advice. In Leon, Wakulla, Jefferson, Franklin, Gadsden, Calhoun, Liberty, and Jackson Counties, refer them to the advice hotline. In all other counties, advise them they will have to fill out an application.”



- Q. "I'm not asking for legal advice, just an answer to my question."
- A. "Your question would involve giving legal advice. If it has anything to do with your rights, pertaining to what the law is, or if a document is legal, it would be legal advice and I cannot answer your question."
- Q. "I would like an appointment to see an attorney."
- A. "We do not schedule appointments. First, you need to fill out an application. We can mail one to you."
- Q. "(Attorney) handled a problem for me a while back and I want to talk to them about another problem I have."
- A. "You need to fill out another application as it would be handled as a separate matter."
- Q. "I am being sued in Alabama and need representation."
- A. "We would not be able to represent you because our attorneys are not licensed to practice in Alabama. You may fill out an application with us requesting that we refer you to a legal services office in Alabama. Our attorneys would then review your application to determine if we could refer your case to Alabama."
- Q. "My husband left me and took everything. I have no money and no food to feed my kids. What can I do?"
- A. "There are several agencies in town which may be able to help you. Let me give you their phone numbers:
- Food— \_\_\_\_\_
- Cash— \_\_\_\_\_
- Other— \_\_\_\_\_
- Q. "My husband beat me up and threatened to kill me. I can't go back home and I'm afraid he'll come looking for me. What can I do?"
- Try to refer their call to one of our domestic violence attorneys. If he/she is not available, inform them:
- A. "There is an agency in town that provides a shelter for victims and their children. The location is confidential so that you will be safe. Let me give you their phone number. \_\_\_\_\_. You should also call local law enforcement at \_\_\_\_\_. Our attorney who handles these matters is not available. Can he/she call you back?"

#### IV. FURTHER INQUIRY

##### A. Scheduling Appointments:

1. Appointment–Client with attorney:
  - a. Attorneys schedule appointments with clients.
2. Appointment–Deferred
  - a. Attorney will send client a letter advising client to contact the office to schedule an appointment with attorney.
3. Appointment–Emergency
  - a. Determine if it is indeed an emergency case.
    1. In danger of domestic violence
    2. Tenant Eviction
    3. Foreclosure
    4. Summons that needs to be answered within the next two weeks
    5. Hearing in next two weeks where they need advice
  - b. Check to see if an attorney (either staff or hotline) is available to speak with caller who has an emergency.
  - c. If an attorney is not available, advise caller that you will have an attorney give them a call as soon as possible.

#### Q & A

Q. “I need an appointment with my attorney.”

You should ask:

- A. “Who is your attorney?”
- B. “Did you receive a letter from (attorney) asking you to make an appointment?”
- C. “I will give (attorney) a message that you called to schedule an appointment.”

B. Case Approval:

1. All applications received during the week are reviewed by the attorneys at a case acceptance meeting once a week. In this office they meet on \_\_\_\_\_.
2. Within a day or two after the application has been reviewed, the applicant will be notified by letter as to whether or not their case has been accepted or if they need to contact the office because more information was needed to make a determination.
3. Accepted cases will then be tickled for 2-4 weeks to allow the attorney assigned to finish work on previous cases.
4. 2-4 weeks after acceptance the attorney will be contacting the client to discuss their case.

Q & A:

- Q. "I'm calling to see if my case was accepted."
- A. "One moment and I'll check."
  - B. "Yes, it was accepted. The attorney that is assigned to work with you will be contacting you in 2-4 weeks to discuss your case."
  - C. "No, it was rejected. You will be receiving a letter very shortly explaining why."
  - D. "Our records indicate that our attorneys need more information before they can make a decision. You will receive a deferment letter shortly; please contact the legal staff when you receive it. You may need to come in for an appointment."

C. Process of Case:

1. The case will be tickled for 2-4 weeks after acceptance.
2. Then, the attorney or paralegal will review the case and contact the client to discuss it.
3. If any paperwork or filing is involved, the attorney or paralegal will prepare the paperwork and ask the client to come in.
4. An appointment is scheduled at which the client reviews the paperwork and signs any necessary papers.

5. If filing is necessary, it is done shortly after the paperwork is signed.
6. If a summons needs to be served, it is sent to the sheriff's office shortly after filing.
7. Once a summons is served, the person being served has 20 days to answer the complaint or petition. No further action can be taken until after the 20 days has passed.
8. If the person served has not submitted an answer to the court after 20 days, a default judgment can be entered in the client's favor. Usually, the client goes with their attorney to appear before the judge for a final hearing.
9. If the person served does submit an answer to the court within 20 days, the attorney will advise the client as to what course will now be taken.
10. After the final hearing or satisfactory completion of the case, the client's case will be closed. If the client wishes to obtain more help in the future, they need to reapply.

Q & A:

Q. "Your office is going to do my divorce. What happens next?"

A. First, depending on the attorney's present caseload, it will be 2-4 weeks from the time your case was accepted before the attorney will contact you to prepare the necessary papers. At that time, your attorney will discuss with you the necessary steps that will occur during your divorce proceeding.

D. Request for Information on a Case by Third Party:

1. A third party, as used in this manual, is anyone who is not our client or LSNF personnel. So a third party, as used in this manual, includes the opposing party.
2. Absolutely NO information can be given to a third party unless the client has given permission to give information to a specific person.
3. If someone calls asking if a person is a client or not, DO NOT tell them, unless the client has given permission to tell a specific person and the client's permission is documented.

4. Anytime there is a request for information by a third party, explain that, because of confidentiality, we cannot fulfill their request. If they insist, take a name and phone number along with the request, and give it to the client's attorney.

Q & A:

- Q. "I need to know if your office has filed a bankruptcy on (client's name)."
- A. "I'm sorry. That information is confidential. If you wish to obtain any information on a bankruptcy that has already been filed, you may check with the Clerk of the Bankruptcy Court in \_\_\_\_\_."
- Q. "I need to find out if (name) is a client of Legal Services."
- A. "I'm sorry. That information is confidential. We cannot tell you whether a person is a client or not."
- Q. "One of your attorneys there is handling a divorce case for (client's name) and I am her mother-in-law. I would like to talk to her attorney."
- A. "I'm sorry. We cannot discuss a case with anyone without permission from the client."
- Q. "I need to find out if you are handling a divorce for my wife."
- A. "I'm sorry. We cannot tell you if a person is a client or not. If we are representing your wife, you will receive a summons notifying you that your wife has filed for a divorce and the summons would state who was representing her."

V. SCREENING CLIENT CALLS

A. General:

\_\_\_\_\_ It is important that you screen clients' calls. Because of the number of clients handled by each office and the numerous crises their clients encounter, each office usually receives many calls from clients wanting to talk to their attorney. DO NOT give out any information from a file without obtaining information from the responsible attorney first. Many of the questions clients have are actually administrative in nature rather than legal and can be answered by the secretary.

Q & A:

Determine if the person is indeed a client:

Q. "I want to talk to (attorney's name)."

A. "Are you a client?" "What is your name?"

If the name is not familiar, check the database.

NO—"Inform them they need to fill out application."

YES—"What is your call in reference to?"

Q. "I want to talk with him/her about my divorce case."

A. "What specific questions did you have?"

Listen to the question.

If it is an administrative question (i.e., hearing date, has summons been answered, where can they get help for paying bills, etc.) and you can answer their question or refer them to an agency, do so.

If it is a legal question, refer the call to their attorney or take a message if their attorney is not available.

**Please Note:** If the attorney cannot come to the phone, DO NOT say "he is busy." Use one of the following:

He is with a client.

He is at the courthouse.

He is preparing for a hearing.

He is not taking calls at this time.

He is unavailable at the moment.